



# Downtown Lansing

Lansing, Michigan

## Market Study and Strategies Summary Version



Prepared for  
**Lansing Economic  
Development Corporation**



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# Introduction

## Why Downtown Lansing Matters. And Why This Study Matters...

By Bob Trezise, President and CEO  
Lansing Economic Development Corporation

*No doubt, troubled economic times are upon us. This may slow or delay certain economic projects, including some planned for downtown Lansing. But in the long run, downtown Lansing is strategically and advantageously poised to play a lead role in regional economic development efforts. In fact, even in the short term, downtown is playing a crucial role during this downturn, providing rare construction jobs, ongoing projects and increased, general economic activity. Simply put, downtown Lansing is the greatest hope as a jobs engine for the Greater Lansing region, currently clustering tens of thousands of jobs from both the private and public sector lead companies in the region.*

*Four important economic points with regard to the downtown: First, because the city of Lansing has an individual income tax, these tens of thousands of employees, mostly from outside the city, generate enormous revenue for citywide services. Second, though the Tax Increment Finance Authority (TIFA) District captures new revenue from the downtown, this revenue pays debt that would otherwise be paid by the City of Lansing and reflected on the City's books as a liability. The City also would only be able to use its 16 mills to pay this debt, while the TIFA captures 63 mills to pay the debt. Third, the sheer cluster of high profile companies and public/higher education institutions and the visual tallness of the buildings, inherently represents, if not measures, the entire region's health, wealth and cultural vibrancy. As the downtown goes, so goes the region. Fourth, unlike the last 50 years, short and long term market trends, as well as environmental trends, now point toward the downtown as a unique Michigan location to enjoy a return on investment in housing, retail and corporate headquarters development.*

*In fact, our city and region's hopes for future growth in the 21<sup>st</sup> Century's knowledge-based economy will largely hinge on our ability to attract and retain the younger and creative labor force, entrepreneurs and high tech firms. The new success of downtown Lansing will certainly be, in great part, a main ingredient for our city's and region's success in this new economy. Because of this fact, downtown Lansing must be a top regional, city and university priority.*

*It had been ten years since a market study was last completed for downtown Lansing, and we have advanced many light years beyond that study's window. So I invite you to dig in to this study and consider the strategies proposed. Then, let's all re-focus and work even harder as one team, and get ready for a big future! Thanks to the LEDC Board of Directors for funding this study, and to all who participated in the process to complete the study.*



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# Background

Downtown Lansing is experiencing an economic boom not seen in fifty years. Recent and planned private sector investments totaling nearly \$600 million are changing the complexion and economic dynamics of the capitol city's traditional downtown business district. These investments are also providing momentum for a new series of recently approved projects that include:

- ▶ The landmark renovation of the long abandoned Ottawa Power Station plant to house the new Accident Fund world headquarters. The project will create 500 new jobs and is slated for completion in March 2011.
- ▶ A new City Market facility being developed as part of the \$24 million Market Place riverfront project, scheduled for construction beginning in April 2009.
- ▶ Development of a new high rise condominium building planned for at least 12 stories and 30 residential units. Construction for the estimated \$22 million project is expected to get underway in March 2009.
- ▶ The relocation of the Michigan State Police headquarters to downtown Lansing which will add 550 employees to the downtown's swelling workplace population. The new headquarters is expected to open in January 2010.

These and other projects recently completed, on the drawing board or already underway stand to build upon momentum gained during the past three years and drive positive changes that will mark an epic period in downtown Lansing's evolution. LEDC statistics show three-year private sector investment of approximately \$600 million and over 4,000 jobs created as a result of 77 projects in the city of Lansing, with the majority of projects centered in the downtown area.

None of this should be surprising since downtown Lansing is home to:

- ▶ Cooley Law School – the nation's largest and most diverse law school
- ▶ State government
- ▶ Lansing Community College – the state's fourth largest community college
- ▶ The Stadium District featuring the Lansing Center and Oldsmobile Park – home of the Lansing Lugnuts
- ▶ The Boarshead and Riverwalk theaters
- ▶ A beautiful riverfront that is being revitalized as a downtown – and community – asset
- ▶ A number of corporate headquarters, state associations and related lobbying and law firms



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# Background

Activity revolving around these and other downtown Lansing anchors and attractions are also reshaping the district as a place to call “home.” The Stadium District, Printers Row and Arbaugh Building mixed use buildings, and other buildings spread throughout the district are, today, home to downtown Lansing residents occupying an estimated 450 lofts, apartments and condos in an area that, just some three years ago, was essentially void of residents.

Exciting initiatives spearheaded by Mayor Bernero and Lansing Economic Development Corporation (LEDC) are also working to fuel optimism, attract investment and capitalize on opportunities for the future. For example, the newly created and fully-staffed Linking Lansing and “U” initiative is specifically designed to connect the “knowledge class” comprised of students and graduates from Michigan State University, Cooley Law School, Lansing Community College, and other young professionals, with downtown Lansing. Early efforts of the initiative are already helping to bridge the gap between downtown Lansing, downtown East Lansing and the MSU campus, located just two miles east of downtown Lansing.

Already today, downtown Lansing is home to a new breed and generation of younger, highly professional and progressive investors, developers and entrepreneurs that are staking their claim in the future of downtown Lansing. This visionary and entrepreneurial cadre, so desperately sought yet rarely found in communities across the United States is, in fact, among the downtown’s most prized assets. The collective efforts and investments of these visionaries have been instrumental to the downtown’s historic resurgence and are marking a new, exciting and prosperous era in downtown Lansing’s evolution.

Indeed, the downtown Lansing that for decades was somewhat of a sleepy district and experienced the usual urban decay has changed, and the change has been nothing short of dramatic. Today, downtown Lansing serves as a beacon of promise, optimism and success for Michigan’s capitol city.



The Stadium District, Printers Row and Arbaugh Building mixed use buildings, and other buildings spread throughout the district are, today, home to downtown Lansing residents occupying an estimated 450 lofts, apartments and condos in an area that, just some three years ago, was essentially void of residents.



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# Study Objectives

Change occurring in the downtown Lansing district during the past three years has been significant and historic. Lansing Economic Development Corporation (LEDC) commissioned the Downtown Lansing Market Study and Strategies project because it recognized that the completion of a market study that is rooted in “real time” information and emerging trends would be imperative to efforts focused on building a foundation for the continuing and future success of Lansing downtown revitalization initiatives. The study process, then, was designed to provide a current, real-time snapshot of downtown Lansing today and to offer a glimpse of the downtown’s potential and opportunities for the future, with special emphasis directed toward:



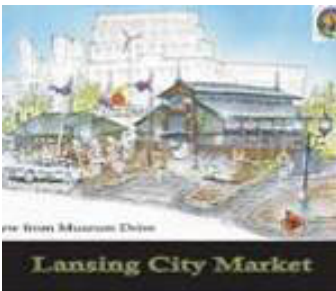
## Business Opportunities

Research techniques were tailored to explore the downtown’s current and future mix of office and commercial uses – with a special emphasis on potential retail types that could be “top prospects” for retention, expansion and recruitment. Recent and projected demographic and economic trends are analyzed to zero in on characteristics of targeted consumer segments, existing and evolving retail niches, and both retail and non-retail traffic generators that provide a solid basis for downtown Lansing business development strategies.



## Residential Opportunities

National trends in downtown commercial district housing and consumer segments that *choose* to live in an urban setting offer exciting opportunities for downtown Lansing. Findings from focus groups and a downtown employee survey performed as part of this study reveal relatively high levels of interest in a variety of housing styles that could be appropriate for downtown Lansing—and continued growth for the downtown Lansing housing market .



## New City Market Opportunities

The Downtown Lansing Market Study process directed special attention to the new City Market facility in an effort to examine potential business uses, consumer segments and related marketing strategies that could be important to the new City Market’s success. The process was designed to tap into the existing network and knowledge base developed throughout the new City Market’s development process, and to assess how identified demographic traits, lifestyle characteristics, economic trends and even local movements like Lansing’s “Go Green” initiative could relate to—and offer exciting opportunities for—the new City Market’s “flavor” and “mix.”

The study’s findings and resulting strategies are couched in the *Main Street Approach to Downtown Revitalization*.™ Lansing’s Principal Shopping District (PSD) recently adopted a Main Street organizational structure to benefit the many new retail businesses in the immediate downtown area. Downtown Lansing’s Main Street initiative has been accepted by Michigan Main Street as a first tier-type Main Street organization – that is, one in the beginning stages. The format of the study’s Implementation Strategy is designed to serve as a “first steps” guide for actions and projects that align with Main Street’s Four-point Approach – a comprehensive downtown revitalization strategy advancing efforts in the areas of Organization, Promotion, Design and Economic Restructuring.

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# Conditions

## Development Patterns

The nature and patterns of development that characterize downtown Lansing offer diverse and changing experiences. Development patterns seem to emanate from three primary corridors or “main streets” that also serve to connect various attractions, employment centers and nodes of activity located throughout the downtown district.



**Washington Square**, from the I-496/REO Town area to the south to Lansing Community College at its north end, features streetscape features and amenities with priority given to the pedestrian. The four-block span from Kalamazoo Street to Ottawa Street features the district’s most dense and continuous concentration of retail and eating & drinking establishments, and relatively few interruptions in the “streetwall” created by building facades abutting the sidewalk. Development patterns in the stretches lying north and south of this four-block core area are less dense, are interrupted by setbacks and gaps in the streetwall, and include a number of buildings that would appear to be candidates for rehabilitation, redevelopment and/or façade improvements.



**Michigan Avenue** links the Sparrow Health System and Stadium District area on the east side to the State Capitol building on the west side. Major attractions along the corridor include Oldsmobile Park, Lansing Center, the downtown’s lone lodging facility and large office and mixed use buildings which dominate the street west of the South Grand Avenue intersection. The corridor, extending east, also serves to bridge the gap – literally and figuratively – between downtown Lansing and Michigan State University, located just two miles east of downtown Lansing.



The **Grand River** serves as a natural north-south artery and link from River Street Park to the south, in proximity to the district’s southern edge at I-496, to Riverfront Park at the district’s northern edge, in proximity to Shiawassee Street, Lansing Community College and the City Market. Recent plans and projects are re-focusing development toward the river and are designed to reclaim the river as a community feature, as evidenced by the \$24 million Market Place riverfront project that re-directs development and active uses toward the banks of the Grand River.

These corridors could be viewed as the main framework for a larger network of streets, buildings and spaces constructing the downtown Lansing business district. Throughout the district, activity nodes are anchored by government, higher education, office, entertainment and residential uses that help to support the downtown’s retail, service and eating & drinking sectors.

## Aesthetics and Appearances

The building stock spans the period of downtown Lansing’s evolution, from early 20th Century buildings and architectural styles to contemporary urban architecture and development styles. A number of buildings in and surrounding the core Washington Square area, in particular, are architectural gems and include ornate details that incorporate art deco styles, terra cotta embellishments and indigenous construction materials. Recognizing the significance of these historic and architectural assets, a downtown historic district is expected to be approved as a National Register District in the spring of 2009.

The downtown district is generally clean and well maintained, probably due in large part to the programs, services and efforts of Lansing’s Principal Shopping District (PSD). A Washington Square streetscape enhancement project scheduled for 2010 will include replacement of various street furniture and fixtures that have become dated and worn with time. This is a prime opportunity to uniformly enhance the Washington Square streetscape and to address worn and inappropriate streetscape features that have been installed over time.

Special streetscape features include special planting areas, interpretive markers and informational kiosks. Wayfinding and public signage appears to be dated and even faded in some respects, and does little to promote a distinct brand for downtown Lansing. So, too, for a community so rich in arts and culture, relatively little can be found in the way of public art.



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# Conditions

## Business Mix and Climate

In much the same way as development patterns throughout the downtown Lansing district offer changing scenery and experiences, the business mix has also evolved in a way that emulates the multi-faceted nature of a traditional downtown business district and an environment that provides for a variety of uses and experiences.

The core Washington Square retail area – the span of Washington Square generally lying between Kalamazoo and Ottawa streets – features an interesting mix of retail establishments, service providers and eating & drinking establishments that largely cater to the downtown workforce. Most retail and eating & drinking establishments are locally owned, though a smaller sample of regional and national franchises also dot the streetscape.

Daytime activity in downtown Lansing is brisk. Most retail establishments are open until 5 or 6 p.m. – a strong indication of the retail sector’s focus on the workplace and student populations. Activity fades, but still extends into the evening hours and largely revolves around eating, drinking and entertainment uses in the Stadium District and in and near the core Washington Square retail zone. So, too, the market for nighttime eating, drinking and entertainment uses expands beyond, and is quite different, than the daytime market which is dominated by the workplace population.

The vast majority of downtown Lansing ground level storefront spaces are occupied. Retail trends of the past three years are positive, with local stakeholders pointing to upward trends in new retail and eating & drinking establishments joining the downtown mix since 2005. These positive trends are anticipated to continue or even accelerate, particularly as the downtown district’s workplace and residential populations continue to increase.

The downtown Lansing office sector is dominated by major public and private sector employers. The new Michigan State Police headquarters project and the redevelopment of the former Ottawa Power Station Plan to house the Accident Fund world headquarters are high-profile indicators of positive trends in the downtown office sector. Beyond these major employment centers, a number of smaller office and service operations can be found at the ground level and in the upper levels of downtown Lansing properties.



The new Michigan State Police headquarters project and the redevelopment of the former Ottawa Power Station Plan to house the Accident Fund world headquarters are high-profile indicators of positive trends in the downtown office sector.



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# Conditions

## Competitive Analysis

Shopping centers and malls located throughout the Lansing area are typically better located in relation to residential concentrations and are well positioned to fulfill the everyday shopping needs of Lansing area residents. National and franchise “name” restaurants located within area shopping centers, on out lots and along busy travel routes also fulfill a need for convenience-driven and familiar-fare dining.

As downtown Lansing assesses opportunities to position itself in the market, it must capitalize on unique characteristics, special features and distinguishing qualities that set the district apart from competing commercial areas that, with few exceptions, could largely be described as generic, predictable and routine.

Downtown Lansing is unequalled in the region as an employment center. Accordingly, the business mix has largely evolved to cater to the needs of the daytime population and the downtown appears to be well positioned to further capitalize on the growing population comprised of downtown employees, residents and students. However, activities and events extending into the evening hours, largely revolving around Stadium District facilities and smaller theater venues located in the downtown area, could provide an exceptional opportunity for the downtown to better position itself as *the* Greater Lansing area’s destination for dining and entertainment.

Input provided by downtown Lansing stakeholders during the study’s preliminary phase begins to pinpoint distinct assets and special features of downtown Lansing that can be parlayed as competitive advantages in the market place. These assets and features, both tangible and intangible, include:

- ▶ An infusion of new investment in downtown construction and redevelopment projects, along with the evolution and expansion of the downtown’s eating & drinking sector, is contributing to an emerging identity of downtown Lansing as a “happening place” and/or a place that is “growing up” to emulate the positive features and qualities of a fresh and new – yet still authentic – urban downtown district for the new century.
- ▶ Downtown Lansing is increasingly becoming known as a place to live, work and entertain. The growing employee and residential populations are bringing new energy and activity to the area that, more and more, is extending beyond the daytime hours and into the evening.
- ▶ A group of younger, highly professional and progressive investors, developers and entrepreneurs are creating and seizing upon opportunities in downtown Lansing. They are also creating a new and rare form of “friendly competition” that is “raising the bar,” and they’re bringing new ideas that are contributing to broader downtown development and marketing initiatives.
- ▶ Downtown Lansing Stadium District facilities, smaller theater venues and special events are also contributing to activity that extends into the evening hours and are attracting area market segments and visitors that are discovering, or rediscovering, downtown Lansing for the first time. LEDC/PSD-compiled statistics estimate annual regular attendance at downtown Lansing venues and events to total more than one million visitors.
- ▶ Downtown Lansing is truly a one of a kind place. The State Capitol, the district’s distinct historic assets and architectural features, and the riverwalk are prominent among the list of unique qualities and assets that set downtown Lansing apart from any other place, and that also contribute to the downtown’s rare and authentic qualities that simply can not be replicated in a shopping mall, strip mall, lifestyle center or “new town center.”
- ▶ State of Michigan “core” community and downtown-specific incentives and programs have had a profound impact on the downtown’s development and resurgence. These incentives and programs, not available to surrounding townships, provide access to tools, assistance and capital that appropriately target unique challenges and opportunities inherent to downtown Lansing and Michigan’s traditional city centers.



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# The Downtown Lansing Markets

Traditional approaches to defining a trade area and market for a downtown business district would fail to adequately capture and describe the market and opportunities for downtown Lansing. The alternative approach applied as part of this study recognizes the divergent qualities of the captive Downtown Lansing Workplace market comprised primarily of downtown employees, students and residents; and the downtown Lansing evening, nighttime and weekend market attracted from throughout the Greater Lansing metro area and beyond.

Information compiled from demographic, psychographic and economic reports obtained from Nielsen Claritas can be used to help profile these distinct markets and to analyze opportunities for downtown Lansing. Nielsen Claritas is one of the nation's leading providers of geo-demographic commercial marketing and business information. Their data is considered among the most comprehensive, reliable, accurate and up-to-date available. Their expertise lies in the depth and quality of more than 60 integrated marketing databases composed of thousands of variables. Their numerous sources allow them to report, geographically, on a variety of demographic, consumer market and business development related variables.

Reports generated and data used to examine the Downtown Lansing Markets include:

## ***WorkPlace and Employment Summary 2008***

Nielsen Claritas Business Facts Workplace Business & Employment reports provide insight into the “work here” population versus the “live here” population. The data population consists of a selected geographic area and the population that works inside the selected area. This allows the user to differentiate between the numbers of permanent residents in an area as compared to those who commute to the area for work purposes.

## ***Workplace PRIZM Distribution 2008***

Workplace PRIZM enables users to create a complete portrait of the “work here” market. Workplace PRIZM tracks the residential population of every census tract into its associated tracts of employment, covering private sector workers, public sector workers, 9-to-5 workers, swing shift and night shift workers—even those who work at home. The Workplace PRIZM composition is estimated using tract-to-tract commuting data produced by the U.S. Census Bureau.

## ***RMP Opportunity Gap – Retail Stores 2008***

Nielsen Claritas Retail Market Power (RMP) database provides an actionable portrait of sales opportunity for optimal site and market analysis, allowing the user to assess growth strategies by accurately targeting the sales gaps that exist in the marketplace. One of the most important features of RMP is that it presents a measure of consumer demand and expenditures, allowing the user to calculate any gaps or surpluses in the marketplace.



The study process was designed to provide a current, real-time snapshot of downtown Lansing today and to offer a glimpse of the downtown's potential and opportunities for the future.

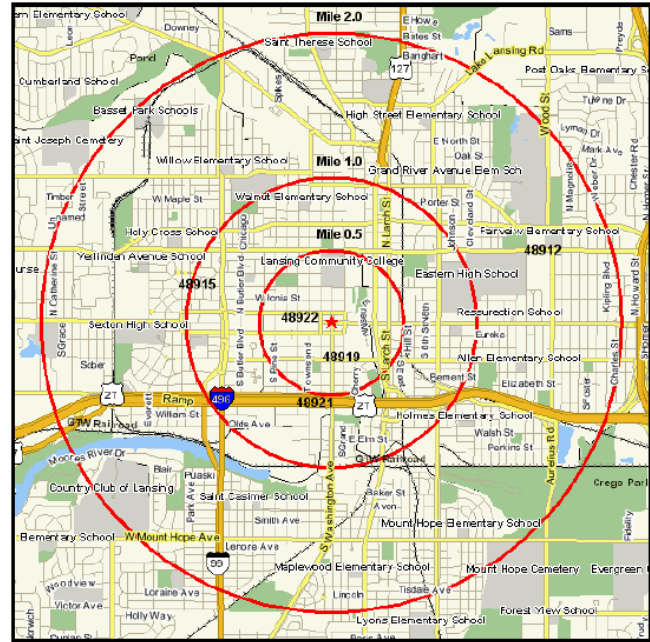
# The Downtown Lansing Markets

## Downtown Lansing Workplace Market

The profile assembled for the Downtown Lansing Workplace Market is based upon information contained in a series of Nielsen Claritas reports generated for downtown Lansing. The reports compile data for a 0.5, 1.0 and 2.0 mile radius originating from the intersection of Michigan Avenue and Washington Square.

The Downtown Lansing Workplace Market, with nearly 35,000 employees within a half-mile radius of the downtown's core, and nearly 75,000 located within a two-mile radius, is an attractive market for downtown retail, eating & drinking and service establishments catering to the needs of the daytime population. The economic impacts of the Workplace Market are evident in Retail Market Power (RMP) estimates showing an overall "sales surplus" (an area estimate of the amount of actual sales in excess of expected consumer demand) for retail and eating & drinking places ranging from about \$64 million in the half-mile radius, to \$76 million in the one-mile radius, to \$63 million in the two-mile radius.

The composition of the Downtown Lansing Workplace Market's population includes high concentrations of affluent professionals, with more than 38% of the workforce population residing within the "Country Comfort" and "Landed Gentry" PRIZM Social Groups.



Downtown Lansing Workplace Market

## Fast Facts

Establishments	0.5 M	1.0 M	2.0 M
All Industries	1,243	1,861	3,082
Private Sector	577	1,067	2,082
Government & Non-Profit	666	794	1,000
Employees	0.5 M	1.0 M	2.0 M
All Industries	34,624	60,553	74,910
Private Sector	9,742	27,185	38,513
Government & Non-Profit	24,882	33,368	36,397
"Live Here"	0.5 M	1.0 M	2.0 M
Population	1,495	11,741	45,869
Households	873	5,445	19,742
Source: Nielsen Claritas 2008.			

### Country Comfort

The five segments in Country Comfort are filled with predominantly white, middle-class homeowners. In their placid towns and scenic bedroom communities, these Americans tend to be married, between the ages of 25 and 54, with or without children. They enjoy comfortable upscale lifestyles, exhibiting high indices for barbecuing and bar-hopping as well as home-based activities such as gardening, woodworking and crafts. Reflecting their rural, family environment, they prefer trucks, SUVs and minivans to cars. 2007 Median Household Income = \$56,380.

### Landed Gentry

Widely scattered throughout the nation, the five segments in the Landed Gentry social group consist of wealthy Americans who migrated to the smaller boomtowns beyond the nation's beltways. Many of the households contain Boomer families and couples with college degrees, professional jobs-they're twice as likely as average Americans to telecommute-and expansive homes. With their upscale incomes, they can afford to spend heavily on consumer electronics, wireless and computer technology, luxury cars, powerboats, books and magazines, children's toys and exercise equipment. 2007 Median Household Income = \$83,854.

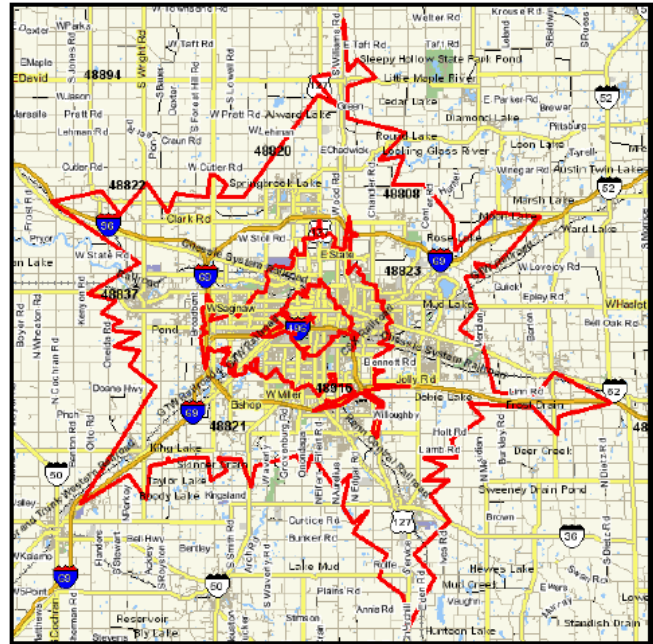
# The Downtown Lansing Markets

## Downtown Lansing Drive Time Market

The profile assembled for the Downtown Lansing Drive Time Market is based upon information contained in a series of Nielsen Claritas reports generated for a 5, 10 and 15-minute drive time area originating from the intersection of Michigan Avenue and Washington Square.

The Nielsen Claritas Pop-Facts Demographic Snapshot Report generated for the Downtown Lansing Drive Time Market provides extensive data to profile, benchmark and track the market. Analysis and comparison of data for the three drive time areas reveals some interesting characteristics and trends including.

- Trends and projections for the population and households within the five and ten-minute drive time areas show declines. Estimates and projections shown for the five-minute drive time would appear to be in conflict with LEDC-tracked data that estimates more than 400 housing units have been added to the downtown inventory within the past three years. This discrepancy could suggest that the data has simply not caught up to real trends in the market, or that declines in population and households outside the downtown core, but still within the five-minute drive time, are outpacing increases in the core area.
- The composition of the five-minute drive time population, as compared to that in the 10 and 20-minute areas, is more ethnically and racially diverse and members are more likely to live in rental housing units. Within the five-minute area, the concentration of rental housing intensifies as one nears the drive time's point of origin at the Michigan Avenue & Washington Square intersection.
- Comparatively lower income estimates shown for residents and households in the five-minute drive time area are most likely the product, in part, of higher concentrations of one-person and student households within the area.
- Though most conveniently located to state government facilities, residents within the five-minute drive time area are about 33% less likely than residents in the further-reaching 10 and 20-minute drive time regions to be employed by state government. However, five-minute drive time area residents are slightly more likely to be self employed and to work at home.



Downtown Lansing Drive Time Market

## Fast Facts

Population	5 Min	10 Min	20 Min
2008 Estimate	40,423	151,441	330,962
2013 Projection	37,616	146,223	330,841
Growth 2008-2013	-6.94%	-3.45%	-0.04%
Households	5 Min	10 Min	20 Min
2008 Estimate	17,193	62,232	134,482
2013 Projection	16,317	61,299	137,046
Growth 2008-2013	-5.10%	-1.50%	+1.91%
2008 Est. Income	5 Min	10 Min	20 Min
Average Household	\$42,428	\$48,461	\$60,220
Median Household	\$33,602	\$38,298	\$46,275
Per Capita	\$18,150	\$20,388	\$24,838
Source: Nielsen Claritas 2008.			

# The Downtown Lansing Markets

## Downtown Drive Time Market Psychographic Profile

The PRIZM consumer segmentation system adds color to the “black & white” demographic description of residents and households within drive time areas. The PRIZM Household Distribution Report describes the population’s likes, dislikes, lifestyles and purchase behaviors for households within the defined geographies. The information is particularly helpful for assessing opportunities for business growth and for designing marketing strategies and messages to reach targeted consumer segments.

As would normally be expected, drive time area households, as compared to the workplace population, are more widely distributed across PRIZM segments. Closer analysis and comparison of workplace and drive time PRIZM segments and their distribution suggest at least three things:

1. The composition and nature of the Downtown Lansing Workplace Market employee population is quite different than that found in the surrounding neighborhoods and even, to certain degree, than that found in the broader region represented by the 20-minute drive time market.
2. The data appears to show that a relatively large number of Downtown Lansing Workplace Market employees are commuting from even beyond the area contained within the 20-minute drive time. During the day, while out of their place of work, they may behave and have needs akin to an away-from-home visitor. Business development and marketing strategies might emphasize a hospitality-oriented approach to best capture and nurture this clientele.
3. Marketing efforts for downtown Lansing must recognize at least two distinct audiences – the Downtown employee market and the Greater Lansing consumer market. Other “captive” markets could include and be identified with students and downtown residents. These audiences may, in varying respects, share little in common. Marketing strategies and messages that might be designed to reach these distinct markets should be highly targeted, accordingly.

## Snapshot

### Capsule Descriptions for Top Three Drive Time Market PRIZM Segments

#### City Startups

##### 12,675 Households in 20 Minute Drive Time

In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats, and clubs that cater to twenty-somethings. One of the youngest segments in America—with ten times as many college students as the national average—these neighborhoods feature low incomes and high concentrations of African-Americans.

#### New Beginnings

##### 6,690 Households in 20 Minute Drive Time

Filled with young, single adults, New Beginnings is a magnet for adults in transition. Many of its residents are twenty-something singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with more than half its residents Hispanic, Asian, or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.

#### Mobility Blues

##### 5,911 Households in 20 Minute Drive Time

Mobility Blues is a segment of young singles in working-class neighborhoods in America’s satellite cities. Ethnically diverse and young, these transient Americans tend to have modest lifestyles due to their lower-income jobs. Surveys show they excel in going to movies, playing basketball, and shooting pool.



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# Community Vision and Perspectives

The process behind the completion of this study was orchestrated to provide opportunities for Lansing area residents and business persons to provide ideas and input that, in large part, form a basis for findings and directions for future downtown Lansing enhancement and marketing strategies. Public participation opportunities included:

- ▶ An open invitation public workshop, attended by community business leaders, district property owners and interested residents who participated in a series of strategic planning exercises.
- ▶ A series of focus groups conducted with key stakeholder groups from throughout the Lansing community.
- ▶ The performance of stakeholder interviews.
- ▶ The performance of a resident survey completed by 122 Downtown Lansing residents.
- ▶ The performance of an employee survey generating responses from 427 Downtown Lansing employees.

## Community Values and Vision

Community stakeholders, residents and business people participating in the study repeatedly emphasized a desire to work cooperatively to enhance the downtown district's existing position as a hub for community and regional life, as well as an appealing and exciting place to live, and for fostering new opportunities to strengthen the district's mix of restaurant, retail, service, entertainment and government-oriented uses.

As the community considers opportunities for the future of the downtown it will be important to maintain and enhance elements and features that residents identify with the district. Workshop and survey participants appear to find consensus in a vision for downtown that reflects a strong sense of the district's significance to the entire state, an identity as a center of commerce and government, and a "special place" that serves as a social and cultural hub for the region and the state. From an economic perspective, the evolving business mix would continue to feature strong entertainment and restaurant offerings, sports and cultural venues, with increased offerings of specialty shops and traditional retail and service businesses catering to the basic needs of the local population and the unique and discriminating tastes of State Capitol visitors.

It will also be important – and even essential – for Lansing Economic Development Corporation, in partnership with Lansing PSD/Main Street, the City of Lansing and other downtown stakeholder organizations, to serve as the primary steward of the community's vision for downtown, to encourage communications and partnerships, and to gather support and resources that will be crucial to achieving the community's vision for downtown Lansing.

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## Survey Says...

**Commuting Patterns:** More than 39% of downtown employee survey participants commuted more than 10 miles to work.

**Let's Do Lunch:** More than 38% of employee survey respondents reported they eat lunch in a downtown restaurant at least once a week, as compared to 31% of downtown residents.

**Watch & Surf:** Television, followed by Internet/Email, was cited by both resident and employee survey participants as the top two media and advertising sources having the most influence on their purchasing decisions.

### Question:

What specific type of new or expanded products, services or business types are needed in downtown Lansing?

#### Top 5 Resident Survey Responses:

1. Grocery
2. Restaurant
3. Clothing & Accessories
4. Movie Theater/Theater
5. Entertainment

#### Top 5 Employee Survey Responses:

1. Restaurant
  2. Clothing & Accessories
  3. Grocery
  4. Specialty Shops—Boutiques
  5. Drugstore
-

# Commercial Opportunities

## Potential Expansion and Growth

Downtown Lansing's growing downtown employee and resident markets, the downtown's built-in visitor market, and the existing strengths of the downtown business mix, are strengths that must be capitalized upon as part of a retail growth strategy. Lansing's new, comprehensive Main Street initiative will also play a key role in attracting consumers and, ultimately, increasing the downtown's market share.

In spite of national and statewide trends that might suggest otherwise, prospects for retail development in downtown Lansing are positive. In fact, the state of the national economy is nothing new to Michigan and the Lansing community. As a result, downtown Lansing economic development officials, developers and other stakeholders have proven resilient and have learned to be resourceful so that, in many ways, downtown Lansing is better positioned to survive and thrive even in the harshest economic climate.

Considering these factors and trends, conservative five-year estimates for expansion in the retail and food & drink sectors are based on the following goals:

- ▶ **Increase the downtown's retail sector sales by 4% to 8% over the next five years.** Growth in the retail sector is likely to be slower given current retail trends and the "retail follows rooftops" phenomenon. Expansion in the short term (one to two years) is likely to be minimal, and it is highly likely that expansion will accelerate or increase exponentially as additional housing units and jobs are added in the downtown area, and as access to capital is restored.
- ▶ **Increase the downtown's food & drink sector sales by 10% to 15% over the next five years.** More immediate and substantial growth in the food & drink sector is more likely given the sector's existing strength and strong market share; projections for job growth related to the Michigan State Police headquarters, Accident Fund world headquarters and other projects already underway; and potential food & drink sector-related growth associated with the New City Market. Growth opportunities might seize on the collective quality and diversity of the downtown's existing mix of eating & drinking establishments. So, too, the growing reputation of downtown Lansing as a regional day and night destination for ethnically and culturally diverse eating, drinking and entertainment venues and experiences might be leveraged to brand and market the International "flair & flavor" of the larger district.

Using estimates of actual sales and applying the five-year sales increase-based scenario, and based on constant dollars, downtown Lansing could potentially support about 10,600 to 21,200 square feet of new and expanded Retail sector uses by 2014; and about 14,700 to 22,100 square feet in new and expanded Food & Drink sector uses by 2014.



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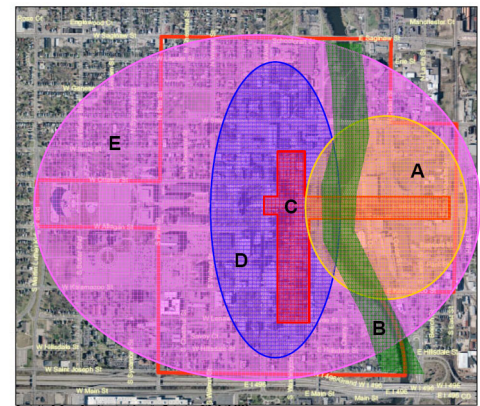
## Top Retail Prospects

Market research findings and a business clustering concept prepared as part of the study provide general direction for various retail business types and merchandise lines that could be prime candidates and appropriate for expansion and recruitment within downtown Lansing.

The business clustering concept provides direction for the preferred placement of various business types. Retail and food & drink sector business types and merchandise lines that appear to be “top candidates” for expansion and recruitment within these clusters, based on the district’s existing business mix, trends in the marketplace, and related findings from focus groups and the downtown resident and worker surveys include:

- ▶ **Food Services & Drinking Places (NAICS 722)**
  - NAICS 7221 – Full – Service Restaurants – Family, Casual
  - NAICS 7222 – Limited-Service Eating Places – Coffee Houses, Delicatessens, Ice Cream, etc.
  - NAICS 7223 – Special Food Services – Catering and Take Out
  - NAICS 7224 – Drinking Places (Alcoholic Beverages)
- ▶ **Food & Beverage Stores (NAICS 445)**
  - NAICS 4451 – Grocery Stores
  - NAICS 4452 – Specialty Food Stores
- ▶ **Clothing & Clothing Accessories Stores (NAICS 448)**
  - NAICS 44812 – Women’s Clothing Stores
- ▶ **Miscellaneous Store Retailers (NAICS 453)**
  - NAICS 45322 – Gift, Novelty & Souvenir Stores
- ▶ **Health and Personal Care Stores (NAICS 446)**
  - NAICS 44611 – Pharmacies and Drug Stores
  - NAICS 44613 – Optical Goods Stores

For most communities, and especially for new Main Street programs, business recruitment is a very daunting task. Often times, landing the first recruit is the most difficult task: others tend to follow as “success breeds success.” For Lansing, the task is likely to be far less daunting. Riding on the momentum of downtown Lansing’s recent economic boom, and with the Lansing Principal Shopping District/Main Street and Lansing Economic Development Corporation working hand-in-hand, prospects for early success are greatly heightened.



- A Stadium District:** Emphasis on eating & drinking places, sports, event and entertainment venues, mixed-use and high-density housing.
- B River Zone:** Emphasis on business types and uses that maximize views and connections to the riverfront including full-service restaurants, recreational retail, lodging & hospitality, and high-density housing.
- C Retail Core:** Emphasis on specialty and impulse retail, full-service and limited service eating & drinking places, personal services, mixed-use and high-density housing.
- D Employment Center:** Emphasis on office, government, non-profit, institutional and educational uses; service businesses; convenience and destination-oriented retail.
- E Neighborhood Ring:** Emphasis on moderate-to-higher density urban neighborhood housing and housing styles; educational institutions and services; neighborhood services and convenience-oriented retail.

A proposed clustering concept for downtown Lansing capitalizes and expands on existing development patterns, distinct activity zones and “layers” that are already apparent or evolving within the larger study area – or “Downtown Neighborhood.”

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# Commercial Opportunities

## Office and Service Uses

Downtown Lansing, particularly in its role as Michigan's Capitol City, is home to a diverse mix of office and service uses, both for-profit and not-for-profit, as evidenced by the building and business inventory completed by LEDC that shows office, service, and non-profit uses occupying nearly 1.5 million square feet and more than 67% of the downtown study area's total floor space.

A reasonable goal for office and service sector expansion might be based on a conservative three-percent increase in floor space attained over a five-year period. Based upon the property and floor space inventory compiled by LEDC at the time of this study showing nearly 1.5 million square feet of floor space for office and services uses, the targeted 3% increase would equate to about 45,000 square feet of new floor space.

Though the national and state office markets are generally weak or over-built, recent development trends feeding downtown Lansing's still growing reputation as a world-class employment center suggest that demand for office and services uses could surpass this admittedly cautious and conservative estimate. It could be considered reasonable to anticipate tenant demand that would support a larger amount of square feet given the following factors and scenarios:

- ▶ Downtown Lansing's already strong and growing niche in the office and service sector.
- ▶ Continued growth in the downtown resident and employee populations, representing captive markets for downtown service providers.
- ▶ Downtown's appeal and reputation as a local, regional, statewide and even global center of commerce, education and operations highlighted by the presence of the State Capitol, Cooley Law School and other related governmental entities, operations and major employers; and the Michigan State Police state headquarters and Accident Fund world headquarters projects currently under construction.

Business types that, based on demographic trends and the nature of the existing business mix, may be likely candidates for expansion as part of downtown's office and service sector include:

- ▶ Educational Services
- ▶ Financial, Legal and Insurance Services
- ▶ Home Décor & Interior Design
- ▶ Laundry & Dry Cleaning
- ▶ Medical Offices
- ▶ Non-profit Offices and Headquarters
- ▶ Personal Fitness and Sports Instruction
- ▶ Recreation (river-based) instruction
- ▶ Salons/Spas



The office and service sectors play an important role in generating consistent traffic and often account for most trips to downtown districts. Past research has shown that area residents are much more likely to visit a downtown district on a daily or weekly basis to do errands and business at an office or other service business, as compared to the frequency of visits that are shopping oriented.



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# Housing Opportunities

Downtown Lansing's housing market is presently the beneficiary of a small, but visionary, coterie of entrepreneurial housing developers who did their homework, got in on the ground floor of what promises to be a positive upswing in the downtown housing market – both in Lansing and around the nation - and are experiencing rather rapid absorption rates for their mid to upscale downtown residential offerings as a result.

The desirability and appeal of a downtown lifestyle option among aging baby-boomers and up and coming young professionals might make planning for and implementing new housing a critically important component of Lansing's downtown enhancement strategy. Downtown Lansing appears to be at a threshold of new resurgence and should fare better than most housing markets over the coming decade.

There is little in the way of evidence to suggest that the recent boom in downtown Lansing rental housing has reached its peak. In fact, high absorption rates and high levels of interest in downtown housing options expressed by survey and focus groups participants, along with information shared by local developers and real estate professionals, point to the continuation of recent multi-unit and mixed-use rental housing development trends. Information compiled by LEDC shows that more than 400 housing units were developed in the downtown area during the past three years, with the vast majority being mid to upscale rental units that were quickly absorbed by the market. Based on the experience of the past three years, and with consideration for current economic and capital market conditions, it is reasonable anticipate demand for 300 to 400 additional downtown rental housing units by 2014.

Current credit restrictions may limit access to capital and make rental offerings the more readily filled units over the short term. However, the upward trend in condominium absorption rates noted in a 2007 Michigan State Housing Development Authority-commissioned study and relatively strong interest in owner-occupied housing options expressed by respondents to the downtown employee survey point to opportunities in the condominium housing market. Based upon reported absorption rates, and with consideration for current residential real estate and financial market conditions, reasonable estimates of owner-occupied multi-unit housing could be based on an absorption rate of 1.00 to 1.25 units sold per month over a five-year period – resulting in an increase 60 to 75 units by 2014.

Other housing-related opportunities could include possibilities for alternative mixed-use housing alternatives that incorporate seasonal housing, time share units and/or extended stay lodging specifically targeting business travelers and part-time and seasonal residents. These concepts might also help to fill a need for additional downtown lodging options identified in focus groups and stakeholder interviews.



## Survey Says...

**Welcome to the Neighborhood:** More than 54% of downtown resident survey respondents indicated they have lived in the district for two years or less.

**Choosing Downtown:** More than 48% of downtown residents responding to the survey selected "Convenience to work or school" as their primary reason for choosing to live in downtown Lansing. "Affordability" (17.7%) and "Convenience to downtown attractions" (10.3%) also fared well among the choices.

**Rating Downtown as a Place to Live:** More than 36% of survey respondents rated downtown Lansing as an "Excellent" or "Very Good" place to live while only 12% returned a negative rating of "Poor" or "Very Poor." Overall, about 88% of all downtown resident survey respondents provided a positive rating ranging from "Good" to "Excellent."

**Interested?** When asked, "Would you consider living in downtown Lansing?" 34% of downtown Lansing employee survey respondents indicated "yes" or "maybe."

# City Market

The Downtown Lansing Market Study process directed special attention to the new City Market facility in an effort to examine potential business uses, consumer segments and related marketing strategies that could be important to the new City Market's success. The process was designed to tap into the existing network and knowledge base developed throughout the New City Market's development process, and to assess how identified demographic traits, lifestyle characteristics, economic trends and opportunities in the broader marketplace could relate to—and offer exciting opportunities for—the new City Market's "flavor" and "mix."

The downtown employee and resident surveys, along with a series of focus groups, included research components designed to gauge public opinion regarding the City Market, both in its existing incarnation and as preparation for the upcoming construction and opening of the New City Market in its new scenic setting along the Grand River. There was overwhelming agreement among focus group attendees and survey respondents both in terms of challenges and opportunities for the City Market.

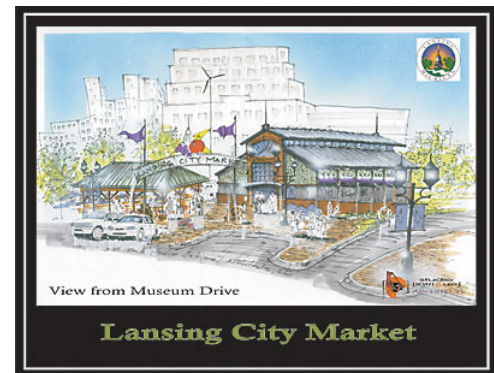
Focus groups were near unanimous in uncovering a single over-riding opportunity for the City Market: it can fill, to a certain extent, a strong pent up demand in the downtown for food items and every day resident needs. This perceived need was reinforced by secondary data showing sizable retail sales leakage occurring within the five-minute drive time and 1.0 and 2.0-mile radii for groceries and other foods – the items which are the primary product of the market.

Downtown Lansing RMP Opportunity Gap  
**Groceries and Other Foods**

Drive Time/Radius	Sales Gap (Leakage)
5 Minute Drive	\$ (31,508,535)
1 Mile Radius	\$ (2,557,331)
2 Mile Radius	\$ (38,279,165)

Efforts to capture an increased share of the downtown employees market, among the City Market's best opportunities, may lie in offering a unique lunch time experience. However, certain barriers must still be overcome to enhance the accessibility and convenience of the market to this segment. Proposed strategies include the introduction of a free downtown trolley during the lunchtime period (i.e., 11 am to 2 pm).

A trolley or shuttle, running a tight circular route taking in the restaurants along Washington Square, those in the stadium district and making a stop at City Market on every circuit might be beneficial to all the restaurants in the downtown, and might prove crucial to the City Market's efforts to increase its share of the Downtown Lansing Workplace Market.



## Survey Says...

### Question:

What specific types of new or expanded products are needed and would you be most likely to purchase at the City Market?

#### Top 5 Resident Survey Responses:

1. Produce (fruits, vegetables, greens, etc)
2. General: groceries, food, staples, etc.
3. Meats/Poultry
4. Prepared foods, salad bar, take-out, etc.
5. Flowers/Plants/Gardening

#### Top 5 Employee Survey Responses:

1. Produce (fruits, vegetables, greens, etc)
2. Florist/flowers/plants/garden
3. Locally grown/produced
4. Lunch/café/restaurant, etc.
5. Baked goods/fresh bread/pastries, etc.



# First Steps Implementation Strategy

The Downtown Lansing Market Study provides a snapshot of the district today and explores opportunities for the future. The time frame for planning and implementing projects based on findings and opportunities identified as part of this study could extend up to ten years – or even more.

Because historic commercial district revitalization and redevelopment occurs within a dynamic environment – and downtown Lansing’s environment has proved to be particularly dynamic in recent years – no set of specific implementation steps can remain valid for such a long time. Even in the short term, changing economic, social, political and cultural conditions may dictate a different sequence of events. Some projects might be implemented earlier if the right set of opportunities present themselves, or the community may determine that a project should be tabled as new opportunities emerge and others take priority. Because of these limitations, an implementation strategy can only be a general guide for implementing key aspects of the study.

The First Steps Implementation Strategy summarizes and prioritizes projects and activities that, undertaken as part of a comprehensive and incremental approach to Downtown Lansing’s enhancement, will advance long-term redevelopment and revitalization goals for the downtown.

Key market study findings and implications are summarized and potential “Action Steps” are organized in the areas of Economic Restructuring, Marketing & Promotion, Design and Organization – a format consistent with the Lansing Principal Shopping District/Main Street structure and its 4-point approach to downtown revitalization. By the very nature of the market study, implementation strategy actions are primarily focused in the areas of economic restructuring and promotion.

Marketing and Promotion Action Steps			
Action	Description		Priority Level
1	Review promotional calendar for appeal to both local and visitor market segments.		0
2	Develop a professional quality logo to visually identify and brand the district in all downtown promotional materials and branding system extensions (i.e., wayfinding signage, kiosks, advertising, website, etc.)		0
3	Work and support efforts to enhance and maintain existing downtown festivals and events and to introduce new events and activities – or new event components - that are consistent with downtown Lansing marketing strategies and that appeal to key market segments.		0
4	Work closely with local, regional and state tourism organizations to promote downtown Lansing as a regional visitor attraction.		0
5	Develop a downtown products and services directory for distribution to downtown residents and to daytime workers/consumers.		1
6	Support, promote and facilitate downtown business community cooperative advertising and cross-marketing efforts.		1
7	Create, re-design and/or update and maintain a Downtown Lansing Internet website with constantly fresh feature content and links to downtown businesses, community partners and Lansing visitor-oriented websites.		1
8	Create a professionally produced Downtown Lansing Shopping and Attractions Guide and/or “Night Away From It All” guide for placement and distribution at visitor-oriented facilities throughout Lansing and the state.		2
9	Work with the Economic Restructuring Committee to identify possible festival and event components or events series that might be used to enhance the district’s “entertainment factor” and to help assess the feasibility of potential entertainment-oriented businesses and uses.		3
Priority Level Key:			
0 = Immediate and/or Ongoing		1 = Within 1 Year	2 = Within 2 Years
			3 = Within 3 Years

# First Steps Implementation Strategy

Economic Restructuring Action Steps		
Action	Description	Priority Level
1	Distribute a summary version of the market study to existing downtown business and property owners, and to potential business prospects and investors.	0
2	Organize a Business Visitation Program as the first step toward a business assistance program that engages downtown area businesses, promotes available resources, and facilitates the delivery of business assistance resources.	0
3	Update and maintain the downtown Lansing property and business inventory; maintain a current list of available properties, businesses and redevelopment sites and distribute the list to area commercial realtors and brokers as changes occur.	0
4	Refine and maintain the business clustering concept as a tool to guide business expansion and recruitment efforts – work to gain property owner “buy-in” for the clustering concept.	0
5	Host periodic (i.e., monthly) informal, “Merchant Coffees” to enhance communications among merchants, between Merchants and the Economic Restructuring Committee, and between the many and varied entities working toward improving downtown Lansing.	0
6	Review city land use plans, zoning ordinances, building codes and development policies to ensure compatibility with downtown business development goals and strategies.	1
7	Work with the Design Committee and City to review applicable land use plans and design standards and to ensure that development plans and policies provide direction for appropriate and desirable development within the district	1
8	Devise fact sheets or similar written materials that can be readily updated to describe and promote available business programs and incentives, such as façade design assistance, façade improvement loans and grants, management and marketing consultations, and property and client referrals.	1
9	Facilitate cooperative advertising and marketing efforts that involve property owners and agents to market available space and potential infill and redevelopment opportunities.	2
10	Develop business promotional materials and work with the Organization Committee to develop a Downtown Lansing website as a tool for passive and active recruitment of targeted business prospects and investors.	2
11	Work with local financial institutions to investigate and pursue appropriate options for flexible and/or low-interest loan and/or line-of-credit programs that can be used with available technical and design assistance to leverage increased levels of investment in district buildings and businesses.	2
12	Identify candidates and promote business expansion opportunities based on prospects, business types and merchandise lines identified in the market study.	2
13	Identify and actively recruit specific businesses based on prospects identified in the market study and the availability of appropriate spaces and sites.	2
14	Prepare redevelopment concepts and work with property owners to actively market potential infill and redevelopment sites based on a downtown Lansing land use plan and business types and uses targeted for expansion and recruitment.	3
15	Complete an assessment of the district’s telecommunications infrastructure and work with local utility providers and community development partners to devise a long-term strategy for its improvement and maintenance.	3

## Priority Level Key:

0 = Immediate and/or Ongoing      1 = Within 1 Year      2 = Within 2 Years      3 = Within 3 Years



# First Steps Implementation Strategy

Design Action Steps		
Action	Description	Priority Level
1	Work with the City to ensure improvements to, and proper maintenance of, the downtown streetscape, furnishings and public spaces.	0
2	Assume a lead role in efforts to prepare businesses for the 2010 Washington Square street-scape enhancement project, and to help facilitate and coordinate communications and logistics with project-related entities.	0
3	Monitor parking supply, demand and management policies. As necessary, work with the City to implement policies and/or to commission parking studies to assess the impact of future development and to continuously address the parking needs of downtown Lansing patrons, employees and residents.	0
4	Maintain ongoing historic preservation education efforts designed to enhance the community's awareness of, and appreciation for, the preservation of Downtown Lansing's historic architecture and resources.	0
5	Update, promote, publicize and apply design guidelines, design standards, sign ordinances, etc. to guide and compel quality downtown building improvements, infill construction, development and signs in the private and public realms..	1
6	Assemble, package and promote available incentives and downtown building improvement assistance programs.	1
7	Work with the Economic Restructuring Committee and City to review city land use plans, zoning ordinances, building codes and development policies to ensure compatibility with business development goals and strategies and to promote a business- and investor-friendly regulatory environment.	2
8	Work cooperatively with the City and other community development partners in support of the enhancement of pedestrian/bicycle trails and pathways, especially those that provide opportunities for links and connections with the downtown district, surrounding neighborhoods, and attractions.	3

Organization Action Steps		
Action	Description	Priority Level
1	Develop newsletter or weekly broadsheet team and use newsletter/broadsheet to tell the "good news" about downtown Lansing.	0
2	Develop an independent website and work with all committees to ensure content is regularly updated and "fresh."	0
3	Maintain aggressive, ongoing public relations to publicize plans, projects and results.	0
4	Work with Main Street Committees to identify appropriate funding requirements and pursue funding sources.	0
5	Allocate sufficient funds for volunteer & staff leadership development and technical training.	0
6	Monitor the need for Main Street office support staff, and budget and act accordingly.	0
7	Work with committees to review volunteer requirements, identify potential sources for volunteers, and assist the committees in the recruitment and training of volunteers.	0
8	Work to involve residents, business leaders, elected officials, community leaders and other community organizations in all phases of planning, implementation and management.	0

## Priority Level Key:

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# Conclusion

For Lansing, the completion of this market study is not an end but rather the beginning of a new phase in the community's downtown initiative.

The study's findings reveal a highly attractive and expanding Downtown Workplace market and a growing Downtown Resident market that provide a strong foundation for expansion and development. Strategies for growth build upon the momentum of recent landmark projects and the concerted efforts of public and private sector downtown development partners that are driving an economic boom not seen in fifty years.

In spite of national and statewide trends that might suggest otherwise, prospects for commercial and residential development in downtown Lansing are positive. In fact, the state of the national economy is nothing new to Michigan and the Lansing community. As a result, downtown Lansing economic development officials, developers and other stakeholders have proven resilient and have learned to be resourceful so that, in many ways, downtown Lansing is better positioned to survive and thrive even in the harshest economic climate.

In the short-term, the Accident Fund world headquarters and Michigan State Police state headquarters projects, the development of the New City Market, and the continued expansion of the downtown's housing inventory will continue to fuel positive change in downtown Lansing. These and other exciting projects are also fertilizing the environment for sustainable, long-term growth in the downtown's retail, eating & drinking and entertainment sectors.

The market study presents a "real time snapshot" of downtown Lansing today. However, it can not, and does not pretend to, predict unforeseen changes in the market—both positive and negative—that could lead to shifting priorities, unexpected challenges, or other new and exciting opportunities still over the horizon. So, too, the "first steps" implementation strategy emerging from the study process is a starting point and the framework for a more comprehensive slate of projects that is likely to emerge as local economic development partners and stakeholders continue to study the market, capitalize on opportunities, and embark on new territory.

The framework provides a strong basis upon which stakeholders can plan and act for the future. And it is within this framework that the community will continue to marshal the tools, resources and knowledge necessary to meet new challenges and to capitalize upon fresh opportunities that will mark the next phases in downtown Lansing's evolution.

